



## Breakout Session Schedule

*ALL SESSIONS WILL BE HELD AT THE SEATTLE CONVENTION CENTER  
ALL SPEAKERS AND TOPICS ARE TENTATIVE AT THIS TIME*

### **Monday, April 22**

*8:00 am-5:00 pm*

#### **Fair Housing Compliance (FHC) – Gwen Volk**

The requirements set forth in the Fair Housing Act and Section 504 regulations are enormously complex and far-reaching. NAHMA's Fair Housing Compliance™ (FHC™) course trains managers to understand these complex regulations, and provides clear instructions on fair housing laws.

The comprehensive, practical training manual for this course includes ready-to-use documents and forms to conduct a Section 504 Self-Evaluation and sample Transition Plan. The course teaches a step-by-step approach to determining the administrative and financial feasibility of making units accessible. Not only does NAHMA's Fair Housing course cover the application process, which includes screening, accepting, and rejecting applicants, it also presents instruction on developing company-wide policies and procedures.

*Additional fee and registration required for this course*

# Tuesday, April 23

10:45 am -12:15 pm

**Tax Credit Track *Annual Reporting Expectations*** – Washington State Housing Finance Commission staff  
Set yourself up for success and streamline your LIHTC annual reports by learning more about WSHFC best practices and reporting expectations.

**Regulatory Track *HOTMA: an Overview*** – Gwen Volk

Once Owner software is HOTMA compliant (sometime in mid- to late-2024), HUD will implement the most comprehensive changes to the way HUD properties determine eligibility and calculate income and rent since 1981 when Congress raised the rent cap from 25% to 30% of Adjusted Income. Find out the most significant changes, what guidance HUD has provided to date, and how to prepare to start following the new rules.

**Resident Services Coordinator Track *The Evolution of Service Coordination: Defining Your Role and Meeting HUD's Latest Expectations*** – Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

Service coordination has evolved greatly in the last three decades. What began as information and referral is now rooted in a proactive and holistic approach to resident support and wellness. This presentation will provide an overview of the changing nature of service coordination and will also highlight program expectations, the impacts Service Coordinators have on their properties, and best practices for building your program. HUD's Service Coordinators in Multifamily Housing Resource Guide will also be reviewed.

**Maintenance Track *Leadership Skills for the New Maintenance Supervisor*** – Scott Ployer  
Congratulations! Your knowledge, dedication, commitment, and tenacity have finally paid off. You've been promoted to maintenance supervisor. Now what?

There are several fundamental differences between being a technician and becoming a supervisor. This class will help you better understand what is needed now as you continue on your path to success.

- Understand and recognize the responsibilities of your new role.
- Understand how to take over an already functioning team as their "new" supervisor.
- How to develop your own game plan.
- Create an environment where everyone feels appreciated and part of the team.
- How to coach for improved performance.
- How to handle difficult situations and conversations effectively.
- How to use feedback and positive reinforcement to achieve desired results.

**Misc Track *Special Claims*** – Lori Colvin, CMS

**Unlock More Financial Potential For Your Property!** Join our exclusive training session on Special Claims provided by Contract Management Services (CMS). This training is tailored for owners and management agents of HUD multifamily Section 8 project-based properties. Delve into the intricacies of processing special claims for unpaid rent, unpaid damages, and vacancy loss. Discover how this is not just a bureaucratic process but a strategic avenue to reclaim funds. CMS will demystify the HUD Special Claims Guide, providing actionable insights to transform claim processing into a powerful tool for reducing monetary losses. Learn to turn challenges into triumphs and unlock this hidden revenue stream within your property.

2:00-3:30 pm

**Tax Credit Track** *Tax Credit Essentials – Part 1* – Joe Henry

In this session, we will learn where the Tax Credit program originated, what it can be used for and how to retain them. Details matter such as set-asides and development periods. We will dive into the timelines and development which will include income limits, rent, and unit transfers. Understanding the need for verification of student status is a topic we will also cover in this session along with various examples and mini workshops.

**Regulatory Track** *HOTMA: Income and Assets* – Gwen Volk

HUD is making sweeping changes to whose income counts, exclusions from income and assets, when to count student financial aid, and how to calculate income from assets. Learn the new rules and practice performing the Post-HOTMA calculations.

**Resident Services Coordinator Track** *What is Service Coordination?* – Leslie Hill, Providence Supportive Housing; Gwen Urrutia-Peterson, Providence Supportive Housing, Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

Service coordinators play an important role in HUD-subsidized properties, helping residents connect to necessary benefits and services, and supporting housing stability. Attendees in this session will learn about the service coordination role, HUD's requirements and guidance for service coordination, and how service coordination and property management roles differ and how they can work well as a team to support residents. Service coordinators and property managers will walk away with a foundational understanding of the requirements and best practices of service coordination.

**Maintenance Track** *Emergency Action Planning & Crisis Management* – Scott Ployer

All employees, regardless of how much experience they might have, need to be aware of what is required when dealing with various emergencies. Crisis management is vital. OSHA mandates that emergency action plans be taught to all workers as part of a company's required documented safety training program.

Key Elements and Outcomes: Mandatory OSHA EAP requirements, how to assess, evaluate, and/or prepare your EAP in advance of a crisis or event, what to do before, during, and afterwards, and more

**Other** AHMA Annual Meeting

Please send at least one representative from your organization. The Election of Board Members will take place. Larry Anderson of Rural Housing Preservation Associates LLC and Kris Cook of NAHMA will give a brief rural housing Federal regulatory and legislative update. Kevin Weishaar, President of AHMA, will chair the meeting.

3:45-5:15 pm

**Tax Credit Track** *Tax Credit Essentials – Part 2* – Joe Henry

In this session, we will dive head first into the methods of verification, lifespan of verification forms, and anticipating annual income. It is important to understand the concepts of income and how to calculate it. Joseph Henry will cover in depth the various assets that are included and excluded with some practical application of the newest rules.

**Regulatory Track** *HOTMA: The Section 8 Asset Restrictions* – Gwen Volkr

In enacting the Housing Opportunities Through Modernization Act, Congress imposed restrictions on assets for Section 8 applicants and existing tenants. HUD has been at odds with the industry and tenant rights groups over Congress's intentions with this dramatic change. Join us to find out what happened when the dust settled and what you and your residents will need to do to be in compliance.

**Resident Services Coordinator Track** *Using Data to Enhance your Service Coordination Program*

Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

Service coordinators collect information each day about the residents they serve and their needs that must be met. While this information is important for required annual reporting, it can be used in a variety of ways that can enhance the work they do. This session will explain opportunities to use the information service coordinators collect for HUD and their records to build their program, forge partnerships with community providers and better advocate for residents and service coordination.

**Maintenance Track** *Capital Planning & Asset Preservation* – Scott Ployer

Learning Outcomes and Key Elements.

- Capital planning and why it's so vitally important.
- Understanding the PCNA, Physical Condition Needs Assessment.
- Developing the long term property specific strategic preservation plan
- Importance of integrating capital upgrade projects into the site annual operating budget.
- Understanding financial impacts for not following the PCNA recommendations.
- How to prioritize site needs when faced with limited funding.
- Importance of developing and integrating preventive and predictive maintenance strategies into your day to day operations.

**Misc Track** Speed Dating –

*Description coming*

# Wednesday, April 24

9:00-10:30 am

## **Tax Credit Track** *Understanding the Average Income Test* – Gwen Volk

The Average Income set-aside is intended to allow for mixed-income housing and makes it possible to rent some units to individuals and families with incomes above 60% of median. We will explain how this set-aside works, how to calculate it, and how the applicable fraction applies when this set-aside is in place. We will also review WSHFC's requirements for Owners who opt for this relatively new option.

## **Regulatory Track** *Fair Housing Trends – What You Should Know* – Mike Chin, Civil Rights Enforcement Director, City of Seattle

Attendees will learn about fair housing laws and how to address these issues before they become a fair housing complaint. This session will cover common discriminatory practices, how to handle reasonable accommodations and modifications requests, and how to address and prevent harassment and retaliation in housing. The presenter will provide examples, scenarios, and practical tips on how to prevent discrimination in housing.

## **Resident Services Coordinator Track** *The Evolution of Service Coordination: Defining Your Role and Meeting HUD's Latest Expectations* – Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

*repeated session*

## **Maintenance Track** *Time Management for Maintenance* – Scott Ployer

Did you realize that your time is more valuable than platinum? Don't waste it. Once it's gone, it is gone forever!

Time Management skills are essential for your professional success in the workplace. We'll share best practices on.

- How to plan and prioritize your daily, weekly, monthly, quarterly, and annual tasks.
- How to become more efficient and productive.
- How to overcome procrastination quickly and easily.
- How to delegate more efficiently.
- How to manage ad-hoc projects and tasks given to you that could interrupt your newly found peace of mind.

## **Misc Track** *HOME Program Panel* –

Sarah Dunn, Washington State Department of Commerce

Jamie Wood, City of Seattle Office of Housing

Holly Hodgson, City of Tacoma Office of Housing

Join us for a panel discussion on the ongoing requirements to the HOME assisted units.

10:45 am-12:15 pm

**Tax Credit Track** *Special Unit Rules – Available Unit, Vacant Unit, Unit Transfers* – Gwen Volk  
Master the special unit rules of the tax credit program: The Available Unit rule, The Vacant Unit rule, and The Unit Transfer rule. A straightforward, practical discussion of the rules that make the tax credit program challenging – especially on mixed income properties - with lots of examples and the opportunity to practice applying these rules in real-life situations.

**Regulatory Track** *Maximizing your Assistance Contract* – HUD staff  
Join your HUD AEs to discuss how to make the most of the subsidy contract at your property – contract renewal options and budgets will be covered.

**Resident Services Coordinator Track** *Building a Sustainable Service Coordinator Budget (presentation with HUD involved)*  
Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

Research shows that service coordinators working in affordable senior housing communities help improve the wellness and resiliency of residents. But securing funding to employ a service coordinator isn't always easy. This session will provide an overview of the service coordinator workforce landscape, policies that determine funding availability for service coordinators and process involved in securing funding. In addition, learn best practices for building and submitting service coordinator budgets that are more likely to receive approval from the U.S. Department of Housing and Urban Development and understand how you can meet HUD expectations for service coordinator funding and financial reporting.

**Maintenance Track** *The Fork in the Road: Where Management and Maintenance Meet* – Scott Ployer  
Learning Outcomes and Key Elements.

- How to collaborate as a true partner.
- How to foster higher degrees of teamwork.
- The characteristics of a high performance team and how to manage them.
- The importance of effective and consistent communication.
- How to manage a remote workforce.
- How to train your high performance teams.
- The techniques of an effective team meeting.
- And more more...

**Misc Track** *Understanding Customer Service and Conflict resolution* – Joe Henry  
This session is a great introduction to superior customer service and how to achieve it. This includes topics such as enhancing relationships, use of the telephone, and how customer service through marketing can attract and keep great residents. Dealing with difficult residents is something we all must learn to do. Join Joseph Henry and PCS in learning how to accomplish this and improve every difficult situation through great customer service skills.

1:45-3:15 pm

**Tax Credit Track *Hot Topics*** – Washington State Housing Finance Commission staff

Meet and hear from WSHFC Portfolio Analysts on new policies and procedures you need to know to keep your tax credit property in compliance. Topics will include Updated Extended Vacancy Rent-Ready Report, How to report corrections for Non-Compliance notices, NSPIRE, Commission's current position on HOTMA and General Q and A.

**Regulatory Track *Service programs on a shoestring*** – Gwen Volk

Many affordable properties are required to offer programs to enrich the quality of life of residents but often do not have adequate funds to do so. Take it from someone whose properties won two national awards- largely for their outstanding service programs - without benefit of large budgets or professional service coordination: You too can-do quality programs on a shoestring. BONUS: Participants will receive access to Gwen's "Best Ideas List" with more than 500 no-cost, low-cost programs and activities proven to be successful by your fellow affordable housing managers nationwide.

**Resident Services Coordinator Track *Bringing Service Coordination to RD Properties***

– Melissa Harris, Director of Government Affairs, American Association of Services Coordinators

A longstanding program in HUD Multifamily Housing, service coordinator programs result in improved health outcomes, extended tenancy, and increased community satisfaction among residents. To better support individuals living in rural housing, Rural Development Multifamily properties are now permitted to budget for service coordinator programs.

While the hope is that RD resident outcomes will be similar to those in HUD properties, it's possible that the service coordinator programs themselves will be structured very differently. This session will explore the challenges and opportunities of implementing service coordinator programs in rural housing and will provide an overview of how to request USDA funding.

**Maintenance Track *Critical Thinking & Effective Problem Solving*** – Scott Ployer

Critical thinking skills are vitally important to analyze and evaluate information so that you are able to obtain the greatest amount of knowledge from it.

This workshop will provide some basic skills for you to evaluate, identify, and distinguish between relevant and irrelevant information. It will help you to become more productive at work and provide an invaluable skill to use in your everyday life.

Learn the key elements of critical thinking including.

- Understanding the components of critical thinking
- How to use logical and non-linear thinking techniques in your daily routine
- Identify the benefits of critical thinking and revise perspectives, when necessary to comprehend various problem solving abilities...and more.

**Misc Track *Developing great customer service skills and how to resolve conflicts with residents*** - Joe Henry

There are many skills that are useful in effective conflict resolution. Joseph Henry with Professional Compliance Solutions will take you through some easy steps for conflict resolutions in the workplace and with your residents. We can all develop skills with problem solving and learning to control our emotions. In this session, we will find those paths to resolve the toughest conflicts we sometimes deal with.